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ABSTRACT

This California Evaluation Improvement Project (EIP) Program Evaluation workbook has two purposes. It can be used as a learning and instructional aid while one masters the procedures, techniques, and methods of program evaluation. Used this way, it helps the practitioner summarize and put into practice the subject matter presented in the EIP Program Evaluator's Guide. It is best used, however, as a working notebook which the trained program evaluator can use for recording his or her plans as they are made and for making notes on program evaluation activities and events during the course of the program year. Used this way, it helps the program evaluator keep complete records of the important information related to the program evaluation. It will probably be most useful when an interim or end-of-year program evaluation report has to be prepared, for much of the information needed at those critical times will already have been made a matter of record in the Workbook.
(Author/MV)

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The Evaluation Improvement Program

CALIFORNIA STATE DEPARTMENT OF EDUCATION
WILSON RILES, SUPERINTENDENT

WORKBOOK ON PROGRAM EVALUATION

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The Evaluation Improvement Program

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WORKBOOK ON PROGRAM EVALUATION

A recording notebook developed as part of the California Evaluation Improvement Project under the leadership of the California State Department of Education

Wilson Riles
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FOREWORD

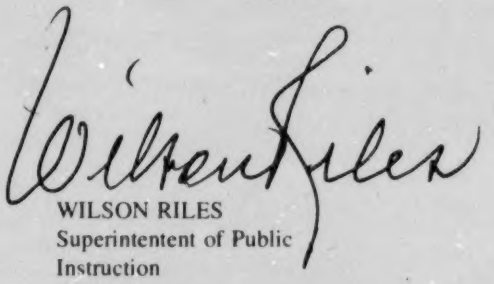
Evaluation of school programs is becoming more of a necessity for survival than a luxury enjoyed only by affluent districts. As financial resources diminish, decisions on how to allocate the available funds must be made. While basic educational research provides much valuable information, that information is usually not the kind on which day-to-day decisions about specific educational programs are based. Program evaluation, as perceived by the California Evaluation Improvement Project, is a means by which useful information is collected and analyzed by a local educational agency for its own use.

While most educators have had courses in testing and measurement and some contact with educational research, there has been little in their training to prepare them for conducting a systematic evaluation of a local school or classroom program. Of course, evaluation has been going on for many years, but it has most frequently been at the intuitive level, with little consistency and little overall impact on the total educational program.

California's response to this problem has been to develop a training program in basic evaluation concepts and skills, which is directed to the classroom teacher, the principal, the curriculum director, or program manager who wants to evaluate a local program to assist in local decision making.

One of the strengths of this training program is that it was developed and field tested throughout California by a group of educators whose backgrounds were primarily in the areas of program planning, curriculum, administration, and supervision. Evaluation specialists were used extensively as consultants as the workshop training program was developed, but the emphasis has been kept on how evaluation information could help in answering questions raised by the developers, whose orientation was basically that of program managers.

There is no magic formula to solve the problems involved in educating the youth of America, but I hope that this training program in basic evaluation concepts and skills will be useful to local schools and districts as they work toward improvement of the educational process.



WILSON RILES
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PREFACE

Program evaluation, through which a school or district evaluates its own program for its own purposes, is different from educational research. It is also different from a state testing program and from gathering information required by the state about achievement levels in specially funded programs. Program evaluation at the school or district level should be something the school or district does for itself for its own purposes, rather than something an outsider does for it.

Program evaluation should be an integral part of the program-planning process. Provisions should be built into each program to collect information that will indicate progress toward the program's objectives, the degree of implementation of the plan, and other information required to make rational decisions about the program.

Program evaluation is of little value unless some use is made of its results. A part of the evaluation process includes identifying potential audiences for the evaluation report, and finding out what kinds of information would be useful to them. Providing useful, timely information to people who can use it is one of the best ways of ensuring that the evaluation reports will be used.

These concepts are basic to the workshop materials that have been developed by the California Evaluation Improvement Project. The materials were designed to be as practical as possible for the educational practitioner, and it is our hope that the reader will find these concepts useful and will be able to apply them to future planning as well as to programs that are currently in operation.

Alexander I. Law
Chief, Office of Program
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William H. Bronson
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Evaluation Improvement Project

INTRODUCTION TO THE EVALUATION IMPROVEMENT PROGRAM

Educational Testing Service (ETS) is pleased to have been selected by the California Department of Education as publisher, under an exclusive license, of the California Evaluation Improvement Project (EIP) materials. These constitute a course of instruction for individuals responsible for school programs and for those who help educational administrators ascertain program effectiveness. At the time of initial publication, spring 1977, the materials in EIP consist of the following:

- *Program Evaluator's Guide*. This is a basic manual which provides in considerable detail background knowledge on the steps involved in planning and carrying out a program evaluation. It is designed as a study guide and learning tool for use in inservice training workshops for program evaluators.

- *Workbook on Program Evaluation*. The *Workbook* has two purposes. It can be put to good use as a learning and instructional aid while one masters the procedures, techniques, and methods of program evaluation. Used this way, it helps the practitioner summarize and put into practice the subject matter presented in the *Program Evaluator's Guide*. It is best used, however, as a working notebook which the trained program evaluator can use for recording his or her plans as they are made and for making notes on program and program evaluation activities and events during the course of the program year. Used this way, it helps the program evaluator keep complete records of the important information related to the program evaluation. It will probably be most useful when an interim or end-of-year program evaluation report has to be prepared, for much of the information needed at those critical times will already have been made a matter of record in the *Workbook*.

- *Evaluation Trainer's Guide*. This volume is a companion to the *Program Evaluator's Guide*. It supplies background and supporting materials for use by instructors conducting program evaluation workshops. Graphic art is provided for visual aids in support of a variety of subjects.

  See the inside back cover for information on obtaining these materials.

Publication early in 1977 of the first of a continuing offering of EIP materials is consistent with ETS's long-term commitment to help advance the art of program evaluation in the elementary and secondary schools. The EIP materials are expected to go through a number of printings under the ETS imprimatur. Each successive printing will be a revised edition. Here we ask the help and cooperation of the readership. If you, as a program evaluation practitioner, identify parts of any of the three works that could benefit from refinement, we hope that you will share your thoughts with us. Join with us to make the EIP materials, initially well developed by the California Evaluation Improvement Project, even better as time goes on. The California Department of Education and Educational Testing Service have joined in the common goal of making the EIP materials as practical and useful as they can be made to be.

Jack R. Childress
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GENERAL GUIDE TO THE USE OF THIS WORKBOOK

Evaluation of school programs is becoming an integral part of the education process. The responsibility for evaluating programs generally, in the past, has been given to specialists. Today more and more of the responsibility for evaluation is being placed upon the shoulders of administrators who have other job responsibilities and who may have had little or no operational experience in developing and implementing a comprehensive evaluation plan.

This workbook is designed for educators who have either an interest in or the responsibility for planning and carrying out an evaluation.

- If you have an extensive background in evaluation, you may want to consider this workbook mainly as a recording device for your evaluation activities. You will probably find the planning wall chart on page 81 to be a useful tool for managing the implementation of your evaluation plan.

- If you know something about evaluation but would like to learn more, you will find this workbook useful in clarifying some of the procedures required in planning an evaluation. The information presented is basic and practical. Supporting information in greater detail is available in the *Program Evaluator's Guide*, the companion learning manual in the Evaluation Improvement Program. The *Guide* also lists other books on program evaluation.

- If you know little or nothing about program evaluation, you have come to the right place to start learning. This workbook will lead you through the steps required to plan a comprehensive evaluation. If there are steps or areas where you feel unsure, consult with a person who has an extensive background in program evaluation. It helps when you are learning to be able to discuss information and issues with someone who has a background in the content.

- The material presented in this workbook is sequentially ordered. The user will want to begin with the first section and proceed through each subsequent section until the evaluation has been completely planned. Upon completion of the last section of the workbook, the user is given instructions on how to fill out the chart. A wall chart will serve as a basic management tool during the implementation of the evaluation plan.

- Throughout this workbook, you will be asked to refer to your **program document** or description (if you have one). Reference is being made to your program proposal or any other document in which your instructional program has been recorded. If plans for your program have not been recorded, you will be developing most of your program as you move through this planning process.

- **This workbook is to be used to plan your evaluation. You should write in it.** The records and notes you make in these pages will stand you in good stead when the time comes for preparation of your program evaluation reports.

1. DEFINE THE PURPOSE OF YOUR EVALUATION

Definition: A statement of actions which will take place at the conclusion of the program as a result of the decision-making use of evaluation information.

EXAMPLES OF PURPOSES

- To determine whether to continue or discontinue the program
- To determine whether to modify the program or to maintain it as currently implemented
- To determine whether to apply for external funding for the next year

WHAT ARE YOU EXPECTED TO DEVELOP FOR THIS SECTION?

- A recorded statement of the purposes of the evaluation

INSTRUCTIONS

1. Read the evaluation section of your program (if you have one) to determine whether there is a statement of the purposes of the evaluation—i.e., the decisions which will be made about the program as a result of conducting the evaluation.

2. If there is a statement of purposes of the evaluation, record it on page 4.

3. If there is no statement of the purposes of the evaluation, you should develop one. Meet with your program director, or someone who has the management responsibility for your program, to develop a statement of the purposes. Record the purposes on page 4.

4. Verify the statement of the purposes of the evaluation with the appropriate decision makers in your district. Use the form below to document the verification. Contact those appropriate people in your district.

NAME	POSITION	AGREE/ACCEPT	DISAGREE/NON-ACCEPTANCE	DATE
_____	School Board	_____	_____	_____
_____	District Supt.	_____	_____	_____
_____	Program Director	_____	_____	_____
_____	Advisory Committee	_____	_____	_____
_____	Assistant Supt.	_____	_____	_____
_____	Principal	_____	_____	_____
_____	Other	_____	_____	_____

5. If all the appropriate decision makers you have listed above agree on the purposes, you have completed this section. Turn to the next section on page 5.

6. If any of the above decision makers disagree with the purposes, proceed to instruction 7.

7. If a disagreement or nonacceptance of the purposes of the evaluation exists, there generally are three categories of reasons:

   - There exists a misunderstanding or lack of definition about the stated purpose. Agreement can be reached by clarifying the purpose.
   - The purpose is understood and rejected because it is not valid. Agreement generally will not be reached until the purpose is redefined.
   - The purpose is understood and rejected for reasons which are probably political. Redefinition of the purpose will probably be required.

   If there is an unresolvable situation, the Superintendent will probably make the final decision.

8. After resolving any differences or disagreements, proceed to the next section on page 5.

WHAT YOU ACCOMPLISHED IF YOU COMPLETED THIS SECTION

- Determined whether the purposes of the evaluation were defined
- Determined the level of acceptance of the purposes
- If the purposes were not accepted, you were able to redefine them and reach agreement.

FORM FOR RECORDING PURPOSES OF THE EVALUATION

2. REVIEW PROGRAM NEEDS-ASSESSMENT INFORMATION

Definition: NEEDS ASSESSMENT—The process for determining the discrepancy between "what is" and "what should be" in terms of results or outcomes and placing those discrepancies in priority order.

EXAMPLES OF NEEDS STATEMENTS

1. What Is: Twenty-five percent of the 12th grade students enrolled in college preparatory courses obtained a score of 500 or higher on the verbal section of the College Entrance Examination Board's Scholastic Aptitude Test.

   What Should Be: Fifty percent of all 12th grade students enrolled in college preparatory courses should attain a score of 500 or higher on the verbal section of the College Entrance Examination Board's Scholastic Aptitude Test.

   Discrepancy: Twenty-five percent of the 12th grade students are performing below the mean score of 500 on the verbal section of the College Entrance Examination Board's Scholastic Aptitude Test.

   Need: To prepare the remaining 25 percent of the college preparatory students to obtain a score of 500 on the verbal section of the College Entrance Examination Board's Scholastic Aptitude Test.

2. What Is: The median reading comprehension grade equivalency level of the regular 4th grade students in the district is 2.5 by the end of the fourth instructional grade year.

   What Should Be: The regular 4th grade students at the end of the instructional year should have a median reading comprehension grade equivalency score of about 4.9.

   Discrepancy: The mean score for 4th grade students at the end of the year is two years and four months below the national norms.

   Need: To increase reading comprehension skills in 1st, 2nd, 3rd, and 4th grade students so as to close the two-year, four-month gap by the end of the 4th grade.

WHAT ARE YOU EXPECTED TO DEVELOP FOR THIS SECTION?

- A recorded list of validated needs to be addressed by the program

INSTRUCTIONS

1. Review your program-related documents to determine whether statements of need are present.

2. If needs-assessment information was available to you, it is important to determine how the information was obtained in order to justify the activities and objectives of the program. If you were not present during the program-planning phase, meet with your program director or someone who assisted in planning the program to find out how the needs assessment was performed. Check the appropriate boxes below.

Part	Mostly	All		THE STATEMENTS OF NEED WERE:
☐	☐	☐	a.	the opinions of the person who wrote the program proposal;
☐	☐	☐	b.	the opinions of a group of educators in or out of the district;
☐	☐	☐	c.	suggested or required by the funding agency;
☐	☐	☐	d.	collected from achievement records and test information, or other records—i.e., observation instruments, questionnaires, interviews, and logs;
☐	☐	☐	e.	obtained from an advisory committee composed of parents and educators;
☐	☐	☐	f.	obtained by an opinion survey of one or more of the following: community, educators, students;
☐	☐	☐	g.	extrapolated from program objectives (needs inferred from statements of objectives);
☐	☐	☐	h.	Other: _____
				_____

If you cannot find any needs statements, you should try to construct a needs assessment. Go to Instruction 9, page 8.

3. Review the needs statements and make sure they are statements about **outcomes/products,** not procedures or instructional processes.

   If the statements are present and are written about outcomes/products, check to see if the four components of needs assessment are present. What is (present condition), what should be (desired condition), the discrepancy, and the need.

   If your needs statements contain the four components, record them on pages 12 and 13 and then go on to the next section on page 15.

4. If your needs statements are missing any of the four components, (statement of what is, statement of what should be, statement of the discrepancy, and statement of need), you should fill in the missing information. Proceed to Instructions 5, 6, 7, 8 below.

5. **If the need is the only component missing,** you have all the information required to form the statement. Use the examples on page 5 as a guide. Record the needs statements on pages 12 and 13.

6. **If the discrepancy statement is the missing component,** your task will be fairly simple because all the information you will require is at hand. The discrepancy is obtained by determining the difference between what is (the present condition) and what should be (the desired or required condition). Record your discrepancy statements on pages 12 and 13.

7. **If the "what is" statement is missing,** you can find the necessary information from two major sources. The first is existing test scores, achievement records and other records of student performance levels, and survey results. The second source is the classroom teachers', administrators', and students' opinions as to the current performance level of students in a given instructional area. Select one or both sources to provide you with the missing information. Record your "what is" statements on pages 12 and 13.

8. **If the "what should be" statement is missing,** you can:

   - Use standards as expressed by test scores; (raw scores or grade equivalencies).
   - Gather the opinions of educators as to what should be the expected performance for a given set of students on a prespecified performance area.
   - Gather the opinions of parents and community representatives as to what should be for a prespecified performance area.

- Obtain the opinions of students.
- Review district statements of philosophy, goals, and policies.

It is suggested that you follow a combination of the above procedures to obtain the required information. Record your "what should be" statements on pages 12 and 13.

When you have completed all four components and recorded them on the recording form on pages 12 and 13, go on to the next section on page 15.

---

9. **If at this point you do not have needs statements,** there are two courses of action to take:

   - Go back and do a needs assessment for each of the performance areas specified in your program objectives. Following this action, you will construct needs statements. If you choose to take this course of action, proceed to Instruction 10 below.
   - Infer what the needs are for each of the performance areas specified in your program objectives. You will not use data to do this, but staff judgments and opinions. Following this inference, you will construct needs statements. If you choose to take this course of action, proceed to Instruction 12 on page 10.

     *For additional information on how to write objectives, refer to the section entitled "3. Review Program Goals and Objectives" on page 15.

10. Now that you have elected to document your needs, you will begin by specifying the performance areas. Locate the objectives for your program. In the spaces provided below, list the performance areas which each objective focuses upon. The performance areas serve as the focus for the data you will be collecting.

> EXAMPLE
>
> Eighty percent of the 11th grade students will be able to score above the 60th percentile on the Stanford Achievement Test in reading vocabulary by the end of the program cycle on June 1, 1977.
>
> The performance area is: reading vocabulary
>
> You will be collecting data on the current performance of 11th grade students in reading vocabulary, establishing the ideal performance level, subtracting the difference, and developing a statement of need.

PERFORMANCE AREA

Objective 1 _____

Objective 2 _____

Objective 3 _____

Objective 4 _____

Objective 5 _____

11. Proceed now to collect your data and develop statements for the following four components of needs assessment:

Statement 1. What is: **To develop a statement of current performance,** you have two major sources of immediate information. The first source is existing test scores, achievement records, and other records of student performance levels. The second source is the classroom teachers', administrators', and students' opinions as to the current performance level of students in a given performance area. Select one or both sources to provide you with the missing information. Record your "what is" statements on pages 12 and 13.

Statement 2. What should be: **To develop a statement of the ideal performance,** you have several ways to obtain the information.

- Use standardized criteria such as grade-equivalency expectations on reading, mathematics, or any other subject area measured by a standardized assessment tool
- Gather the opinions of several educators as to what should be the expected performance for a given set of students on a prespecified performance area
- Gather the opinions of parents and community representatives as to what should be for a prespecified performance area
- Obtain the opinions of students
- Review district statements of philosophy, goals and policies

It is suggested that you follow a combination of the above procedures to obtain the required information. Select your sources and obtain the information. Record your "what should be" statements on pages 12 and 13.

Statement 3. Discrepancy: **Developing the discrepancy statement** will be fairly simple because all the information you will require is at hand. The discrepancy is obtained by determining the difference between what is (the present condition) and what should be (the desired or required condition). Record your discrepancy statements on pages 12 and 13.

Statement 4. Need: **To develop a statement of need,** use the examples on page 11 as a guide. The statement of need should be based on the discrepancy.

12. Since you do not have time to do a needs assessment, your needs statements will be inferred. You will infer the needs from each of your program objectives. This method of obtaining needs statements is to be used as an emergency measure only. The results you obtain may or may not be valid. It is strongly suggested that a valid needs assessment be conducted next time.

- Locate your program objectives.
- In the spaces below, list the performance areas which each objective focuses upon.

EXAMPLE

Eighty percent of the 11th grade students will be able to score above the 60th percentile on the Stanford Achievement Test in reading vocabulary by the end of the program on June 1, 1976.

The performance area is: reading vocabulary

PERFORMANCE AREA

Objective 1 _____

Objective 2 _____

Objective 3 _____

Objective 4 _____

Objective 5 _____

13. Meet with the program staff to obtain their opinions as to the following:

- — WHAT IS or current performance of the students in the performance area
- — WHAT SHOULD BE or ideal performance of the students in the performance area
- — DISCREPANCY between the "what is" and "what should be" which is obtained by subtracting the "what is" from the "what should be"
- — NEED

EXAMPLE

Performance Area - Reading vocabulary (11th grade students)

WHAT IS:	The median 11th grade score is below the 37th percentile in vocabulary.
WHAT SHOULD BE:	All 11th grade students should be scoring at the 50th percentile or above.
DISCREPANCY:	A discrepancy of at least 13 percentile points exists.
NEED:	To improve the reading vocabulary of 11th grade students so that their median score on a reading vocabulary test is improved at least 13 percentile points

14. Write your needs statements based on these opinions. Remember to validate the needs statements with the following persons/groups:
    - — District administrators
    - — Program advisory committee
    - — Program instructional staff
    - — Others appropriate for your program

15. Record your needs statements on pages 12 and 13 and then proceed to the next section on page 15.

WHAT YOU ACCOMPLISHED IF YOU COMPLETED THIS SECTION

- Determined whether statements of need existed
- If the statements did exist, you were able to determine how the assessment of needs was conducted.
- If statements of need did not exist, you were able to develop the statements.

FORM FOR RECORDING ASSESSMENT OF NEEDS

Statement 1 a. WHAT IS: _____

_____

b. WHAT SHOULD BE: _____

_____

c. DISCREPANCY: _____

_____

d. NEED STATEMENT: _____

_____

Statement 2 a. WHAT IS: _____

_____

b. WHAT SHOULD BE: _____

_____

c. DISCREPANCY: _____

_____

d. NEED STATEMENT: _____

_____

Statement 3 a. WHAT IS: _____

_____

b. WHAT SHOULD BE: _____

_____

c. DISCREPANCY: _____

_____

d. NEED STATEMENT: _____

_____

Statement 4 a. WHAT IS: _____

_____

b. WHAT SHOULD BE: _____

_____

c. DISCREPANCY: _____

_____

d. NEED STATEMENT: _____

_____

Statement 5 a. WHAT IS: _____

_____

b. WHAT SHOULD BE: _____

_____

c. DISCREPANCY: _____

_____

d. NEED STATEMENT: _____

_____

3. REVIEW PROGRAM GOALS AND OBJECTIVES

Definition: GOAL—A statement of broad general direction or intent

Definition: OBJECTIVE—A desired accomplishment described in performance terms

EXAMPLE OF A GOAL STATEMENT

Students should acquire the academic skills required for further study.

EXAMPLE OF A PROGRAM OBJECTIVE

Sixty percent of the 4th grade students participating in the KLM Reading Program will score at or above the 50th percentile on the Comprehensive Test of Basic Skills after eight months of specialized reading instruction.

WHAT ARE YOU EXPECTED TO DEVELOP FOR THIS SECTION?

- A set of program objectives which are measurable

INSTRUCTIONS

1. Review your program document to determine if your program has a goal statement. If you find a goal statement, record it here. If you do not find a goal statement, you may want to develop one using the example and definition on page 15. Remember, if you did a needs assessment, your goal statements should be based on that information.

_____

Program Goal(s)

_____

_____

2. If you have a program document, go back to it and locate the objectives for your program. Analyze each program objective according to the following six criteria:

   Does each objective include a statement of . . .

   - WHO
   - DOES WHAT
   - WHEN
   - UNDER WHAT CONDITIONS
   - MINIMUM PERFORMANCE LEVEL
   - HOW WILL IT BE MEASURED

EXAMPLE
WHO—60 percent of the 4th grade students
DOES WHAT—will score
WHEN—after 8 months of specialized reading instruction
UNDER WHAT CONDITIONS—participating in the KLM Reading Program
MINIMUM PERFORMANCE LEVEL—at the 50th percentile or above
HOW WILL IT BE MEASURED—by the Comprehensive Test of Basic Skills

3. If all of your program objectives meet the six criteria for a measurable objective, list your objectives on the recording form on pages 18, 19, and 20.

4. If your program objectives do not meet all of the six criteria of a measurable objective, you should rewrite your objectives. Before rewriting objectives, discuss changes with your program director and decide how the objectives should be stated.

   Now you are ready to begin the rewriting of the objectives. Use the guide on page 18 as a reference for developing your objectives. Record the objectives on page 18, 19, and 20.

5. If you have no objectives for your program, meet with the **program director** and develop a plan to involve the program staff in the development of program objectives. If you have conducted a needs assessment and developed goal statements, you will use this data as a basis for developing program objectives.

   Use the example on page 18 as a guide for developing objectives. Record your program objectives on pages 18, 19, and 20.

WHAT YOU ACCOMPLISHED IF YOU COMPLETED THIS SECTION

- Determined whether goals and objectives had been developed for your program
- Developed program goals if none were available
- Determined whether the program objectives were written in measurable terms
- Rewrote nonmeasurable objectives into measurable statements of performance
- Developed measurable objectives if none existed

FORM FOR RECORDING PROGRAM OBJECTIVES

EXAMPLE

• WHEN?	After 8 months of specialized reading instruction
• WHO?	60% of the 4th grade students
• UNDER WHAT CONDITIONS?	Participating in the KLM Reading Program
• DOES WHAT?	Will score
• MINIMUM PERFORMANCE LEVEL	At the 50th percentile or above
• HOW WILL IT BE MEASURED?	On the Comprehensive Test of Basic Skills

Note: The order in which the above six criteria appear can be changed. The sequencing found on this page and the pages to follow is only a suggestion.

Record your program objectives below.

OBJECTIVE 1

WHEN? _____

WHO? _____

UNDER WHAT CONDITIONS? _____

DOES WHAT? _____

MINIMUM PERFORMANCE LEVEL _____

HOW WILL IT BE MEASURED? _____

FORM FOR RECORDING PROGRAM OBJECTIVES

OBJECTIVE 2

WHEN? _____

WHO? _____

UNDER WHAT
CONDITIONS? _____

DOES WHAT? _____

MINIMUM
PERFORMANCE LEVEL _____

HOW WILL IT
BE MEASURED? _____

OBJECTIVE 3

WHEN? _____

WHO? _____

UNDER WHAT
CONDITIONS? _____

DOES WHAT? _____

MINIMUM
PERFORMANCE LEVEL _____

HOW WILL IT
BE MEASURED? _____

FORM FOR RECORDING PROGRAM OBJECTIVES

OBJECTIVE 4

WHEN?_____

WHO? _____

UNDER WHAT
CONDITIONS?_____

DOES WHAT?_____

MINIMUM
PERFORMANCE LEVEL_____

HOW WILL IT
BE MEASURED?_____

OBJECTIVE 5

WHEN?_____

WHO?_____

UNDER WHAT
CONDITIONS?_____

DOES WHAT?_____

MINIMUM
PERFORMANCE LEVEL _____

HOW WILL IT
BE MEASURED?_____

4. IDENTIFY EVALUATION DATA REQUIREMENTS

Definition: DATA REQUIREMENTS—The information required for program decision making.

EXAMPLES

User	Data Requirements
Program Director	Evaluator will provide the project director with a monthly summary statement of program activities being conducted in all project classrooms. Activities planned and not being conducted will be included in the report.
Instructional Staff	Evaluator will provide each classroom teacher with the results of the pretesting no later than one month after the last test has been given. Results will be reported as individual scores for each student as well as summary scores for the project group.
Board Members	Evaluator will provide gain scores according to predetermined characteristics. Data will be reported for the project group and the comparison group.

WHAT ARE YOU EXPECTED TO DEVELOP FOR THIS SECTION?

- A recorded list of evaluation data required by local program decision makers or the funding agency

INSTRUCTIONS

1. Identify all of the persons who will be potential users of evaluation information for the purpose of making decisions about the program/instruction during the year and at the end of the year. List those persons under the appropriate column on the recording form on pages 23 and 24.

2. Meet with each person to identify WHAT EVALUATION DATA ARE REQUIRED. List those requirements on the form on pages 23 and 24.

3. IDENTIFY WHEN THE DATA ARE REQUIRED. List the data on the form on pages 23 and 24.

4. Identify WHAT THE DATA ARE TO BE USED FOR by making a check in the column for decisions to be made during the year (enroute) and/or at the end of the year. You may want to indicate the specifics of the decisions to be made by describing the decision in the appropriate column.

5. Proceed to the next section on page 25.

WHAT YOU ACCOMPLISHED IF YOU COMPLETED THIS SECTION

- Identified data requirements for local program decision makers
- Identified data requirements for reporting to funding agencies (if applicable to your program)
- Identified a time frame for data requirements

FORM FOR RECORDING DATA REQUIREMENTS

Users of Evaluation Data	What Evaluation Data Are Required	When Data Are Required	What the Data Are to Be Used for	
			Enroute Decisions	End-of-the-Year Decisions
Program Instructional Staff				
Program Administrative Staff				

FORM FOR RECORDING DATA REQUIREMENTS

Users of Evaluation Data	What Evaluation Data Are Required	When Data Are Required	What the Data Are to Be Used for	
			Enroute Decisions	End-of-the-Year Decisions
Other School/District Administrators				
Funding Source				
Other				

5. DETERMINE EVALUATION DESIGN

Definition: EVALUATION DESIGN—A strategy for determining the effects an instructional program has on a group of students (in a special program). The program effects are compared against a standard which generally is a separate comparison group (which didn't have any special program) or a content or behavioral criterion; or the special program group serves as its own comparison group with no external standard.

EXAMPLES

1. Designs utilizing separate comparison group as a standard

   - Pretest-Posttest Design with equivalent Comparison Group
   - Posttest-Only Design with equivalent Comparison Group
   - Pretest-Posttest Design with Nonequivalent Comparison Group

2. Designs utilizing content or behavioral criterion as a standard

   - Individual Student Criterion Mastery Design
   - Group Criterion Mastery Design
   - One Group Pretest-Posttest

WHAT ARE YOU EXPECTED TO DEVELOP FOR THIS SECTION?

- A recorded evaluation design for each program objective

INSTRUCTIONS

1. Review your project proposal or program document to see if an evaluation design has been specified.

2. If a design has been specified, decide what kind of design it is by comparing it with those listed on page 28 and then label it, using a short description.

   Record the evaluation design for each program objective in the appropriate column on page 27.

3. If a design is not indicated or specified in the description of the evaluation in your program document, refer back to your program objectives listed on pages 18, 19, and 20 in this workbook and determine whether an evaluation design is specified or implied in the objectives.

   If you cannot find any indication of an evaluation design in your program objectives or in the evaluation section of your program document, you will have to select an evaluation design for your program. Turn to pages 28, 29, 30, 31, and 32 in this workbook and review the different types of commonly used evaluation designs. Select a design that is appropriate for your program.

WHAT YOU ACCOMPLISHED IF YOU COMPLETED THIS SECTION

- Determined whether an evaluation design existed for your program. If an evaluation design did exist, you were able to locate it, label it by its designator terminology, and record it.

- Or, if a design did not exist, you selected an appropriate evaluation design and recorded it.

FORM FOR RECORDING EVALUATION DESIGN

Objective	Evaluation Design
1	
2	
3	
4	
5	

OVERVIEW OF BASIC EVALUATION DESIGNS

A. Evaluation Designs Using a Comparison Group as a Standard

1. **Pretest-Posttest Design with Comparison Group** (random assignment of students to both groups)	• Special Program Group	→ Pretest	→ Implementation of Program	→ Posttest
	• Control Group	→ Pretest	→ Implementation of Program	→ Posttest
2. **Posttest-Only Design with Comparison Group** (random assignment of students to both groups)	• Special Program Group		→ Implementation of Program	→ Posttest
	• Control Group		→ Implementation of Program	→ Posttest
3. **Pretest-Posttest Design with Nonequivalent Comparison Group** (students have not been randomly assigned to groups)	• Special Program Group	→ Pretest	→ Implementation of Program	→ Posttest
	• Control Group	→ Pretest	→ Implementation of Program	→ Posttest

B. Evaluation Designs Using a Criterion as a Comparative Standard

1. **Individual Student Criterion Mastery Design**	• Prestated Student Performance Objective	→ Implementation of Program	→ Assessment of a Student's Performance	→ Matching Student Performance against Objective
2. **Group Criterion Mastery Design**	• Prestated Group Performance Objective	→ Implementation of Program	→ Assessment of Group's Performance	→ Matching Group Performance against Objective

C. Evaluation Designs Using the Special Program Group as Its Own Comparative Standard

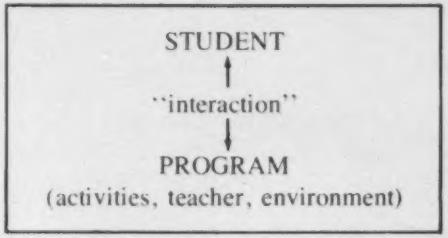
1. **One Group Pretest-Posttest**	• Special Program Group	Pretest	Implementation of Program	Posttest

ADDITIONAL INFORMATION

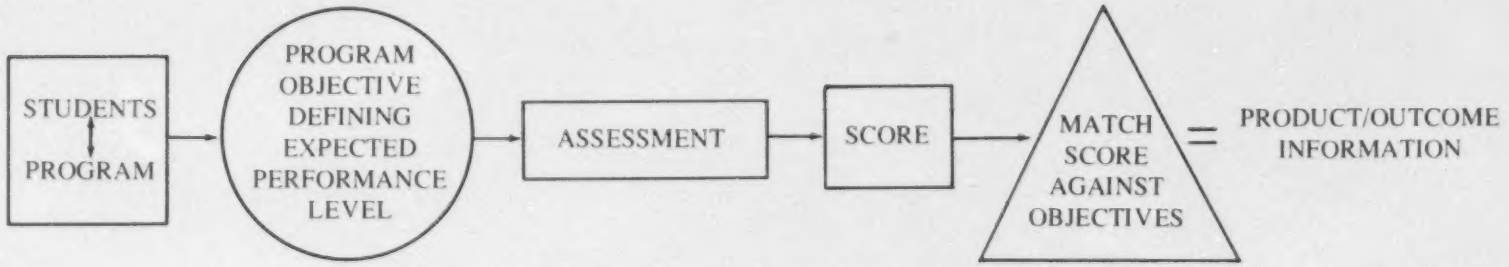
WHY IS AN EVALUATION DESIGN REQUIRED?

A design is required to know ahead of time how to look at the effects the instructional program had on students' scores as obtained by assessment instruments. That is why it is crucial that assessment instruments be carefully selected so that the program is accurately represented by the scores/responses elicited from the instruments.

The evaluation design gives a plan for viewing the interaction between the students and the program.



The evaluation design can be simple or complex depending upon the degree of accuracy of information that is required. The design looks at the following sequence of events:



EVALUATION DESIGNS USING COMPARISON GROUPS AS A STANDARD

1. **Pretest-Posttest Design with Comparison Group**
(random assignment of students to both groups)

- Program (Experimental) Group → Pretest → Implementation of Program → Posttest
- Comparison Group → Pretest → Implementation of Program → Posttest

2. **Posttest Only Design with Comparison Group**
(random assignment of students to both groups)

- Program (Experimental) Group → Implementation of Program → Posttest
- Comparison Group → Implementation of Program → Posttest

3. **Pretest-Posttest Design with Nonequivalent Comparison Group**
(Students h ve not been randomly assigned to groups)

- Program (Experimental) Group → Pretest → Implementation of Program → Posttest
- Comparison Group → Pretest → Implementation of Program → Posttest

EXAMPLE OF PROGRAM OBJECTIVES SUITABLE FOR EVALUATION DESIGNS USING COMPARISON GROUPS

Sample Objectives	Appropriate Evaluation Design
• Eighth grade students enrolled in the Experimental Science Program will, after eight months of instruction, show a gain in achievement test scores comparable to the gain in the norming group on the National Science Foundation Science Achievement Test.	• The objective states that a comparison group will be used for comparison of score gains. Any of the three designs using comparison groups can be used.
• First grade boys will show a gain in attitudes towards reading after four months of instruction in the Experimental Reading Program over 1st grade boys not enrolled in the Experimental Reading Program as measured by the Miami Primary Reading Attitude Survey.	• Same as above

EVALUATION DESIGNS USING A CRITERION FOR A COMPARATIVE STANDARD

1. **Individual Student Criterion Mastery Design**	• Prestated Student Performance Objective	→	Implementation of Program	→	Assessment of a Student's Performance → Matching Student Performance Against Objective
2. **Group Criterion Mastery Design**	• Prestated Group Performance Objective	→	Implementaion of Program	→	Assessment of Group's Performance → Matching Group Performance Against Objective

EXAMPLE OF PROGRAM OBJECTIVES SUITABLE FOR EVALUATION DESIGNS USING CRITERION STANDARDS

Sample Objectives	Appropriate Evaluation Design
• Fifty percent of the 3rd grade students participating in the KLM Reading Program will score at grade level or above on the CTBS Reading Comprehension subtest given after 8 months of specialized instruction.	• Group Criterion Mastery design
• Eighty percent of the 1st grade students participating in the bilingual program will be able to correctly name five Mexican holidays. Evidence of attainment will be found on the 1st grade bilingual checklist.	• Group Criterion Mastery design
• Each 1st grade student participating in the bilingual program will be able to correctly count to 10 in Spanish by the end of the 1st grade. Evidence of attainment will be found on the 1st grade bilingual checklist.	• Individual Student Criterion Mastery

EVALUATION DESIGN USING THE SPECIAL PROGRAM GROUP AS A COMPARATIVE STANDARD

1. **One Group Pretest-Posttest**

EXAMPLE OF A PROGRAM OBJECTIVE SUITABLE FOR EVALUATION DESIGNS USING THE SPECIAL PROGRAM GROUP AS A COMPARATIVE STANDARD

Sample Objective	Appropriate Evaluation Design
• The median percentile rank for those students at School Z enrolled in the K, 1st, 2nd, and 3rd grade reading programs will be at least five points higher for each grade on a May 1975 posttest than on the October 1974 pretest for the same students.	• One Group Pretest-Posttest design.

WHEN TO SELECT A DESIGN USING AN EXTERNAL COMPARISON GROUP

When you want to answer the question, "Is this program more effective than our regular program (or another experimental program)?", you must select a design with an external comparison group. The three designs presented in this workbook are: 1) Pretest-Posttest Design with an equivalent comparison group; 2) Posttest-only design with an equivalent comparison group; 3) Pretest-Posttest design with nonequivalent comparison group.

Which of the above three designs should be selected if you want to use an external comparison group?

- The design that will give you most information is Design 1 (Pretest-Posttest, Equivalent Comparison). This design calls for a random assignment of students to the experimental program and to the comparison program. By use of the random assignment, you can assume that the groups are equivalent.

  The use of the pretest-posttest design gives you baseline information on the groups, whereas the next design (posttest only) does not provide that information.

- The next design to consider is the posttest only, with an equivalent comparison group. This design calls for the random assignment of pupils to the experimental and comparison groups, as does Design 1. The posttest-only design is to be used when you will not be able to collect pretest information or when conditions seem to warrant the posttest only. You will be able to determine whether the program results are better than those of another program. However, you will not know how much growth was made, what areas of the curriculum were affected or why it had better results.

- The third design (pretest-posttest, nonequivalent comparison group) is used when it is not possible to randomly assign students to programs. Technically, the design is not as accurate as Design 1 because you cannot assume that the groups are equal or equivalent. Therefore, the possibility exists that the growth shown at the end of the year may be due to differences in the students and not due to the program.

WHEN TO SELECT A DESIGN USING A CRITERION AS A COMPARATIVE STANDARD

When you do not need to know whether your experimental program is more effective than another program, you might want to consider using one of these two designs: 1) Individual Student Criterion Mastery; 2) Group Criterion Mastery. Either of these designs can tell you whether a student or a group met a criterion. Design 1 (Individual Mastery) is written for measuring each student's mastery. The second design (Group Mastery) is written for a group—that is, the scores are grouped and looked at as a single total.

WHEN TO SELECT A DESIGN USING THE SPECIAL PROGRAM GROUP AS ITS OWN COMPARATIVE STANDARD

If you want to know whether your special program group made significant growth over a period of time, you may want to select the design, **One Group Pretest-Posttest.** This design is for comparing one group with itself; it is not to be used to compare your group with another.

6. IDENTIFY ASSESSMENT INSTRUMENTS

Definition: ASSESSMENT INSTRUMENTS—Devices used to measure effects and to record responses and observations

TYPES OF ASSESSMENT INSTRUMENTS

1. Achievement Tests
   - Norm-referenced achievement tests—An achievement test built to measure broad and general concepts. A student's score can be compared with a national/regional population on which the test was normed.
   - Criterion-referenced achievement tests—An achievement test built upon specific concepts. A student's score is looked at in relation to a specific instructional objective.
2. Questionnaires—Used to measure opinions, attitudes, or judgments
3. Observation Instruments—Used to measure involvement or process behaviors
4. Logs, Records, and Checklists—Used to record a wide variety of information so that measurements related to that information can be made

WHAT ARE YOU EXPECTED TO DEVELOP FOR THIS SECTION?

- A recorded list of appropriate assessment instruments for each program objective

INSTRUCTIONS

1. Refer to your program objectives listed on pages 18, 19, and 20 in this workbook and identify the outcomes (learning behaviors) to be assessed for each program objective.

   Record this information on page 38 under the appropriate columns.

2. If assessment instruments have been specified in your program objectives or in the evaluation section of your program document, obtain a copy of each instrument through the following suggested sources:

   - Commercial publisher
   - Test file in your own district or another district with a similar program
   - Test file in your county office
   - A central clearinghouse such as the Test Collection at Educational Testing Service

   Review each instrument and determine whether each will assess the outcomes (learning behaviors) specified by the objective.

   If the instrument adequately assesses the learning behaviors specified in the content areas, list the instrument on the form on page 38.

3. If assessment instruments have not been specified or are not adequate, refer to behaviors and content on page 38 in this section. Items on this list will be used as criteria for initially locating appropriate assessment instruments (page 38). There are four basic types of assessment instruments to use in program evaluation as mentioned on page 35 (achievement tests, questionnaires, observation instruments, logs and checklists.)

   There are several sources of information regarding assessment instruments which may be appropriate. Use as many of the sources listed here as required. Check the procedures you plan to follow in the spaces provided below.

   _____ Contact other projects/programs similar to yours and ask what assessment instruments they use.

   _____ Ask personnel in your district such as the director of curriculum, director of research and evaluation, test coordinator, or others responsible for or interested in testing.

   _____ Contact your county schools office and ask for the assistance of the evaluation specialist or test and measurement specialist.

_____ If your program is funded by the state or federal government, consult with your program offices.

_____ Locate appropriate standardized instruments in the current edition of Buros' *Mental Measurements Yearbook* or test collections at clearinghouses.

Now that you have located one or more assessment instruments to review for each of your program objectives, obtain a copy of each instrument and review it against the behaviors or content specified in each program objective.

Select the assessment instruments that will adequately measure the behavioral changes specified in the objectives and list on page 38.

4. If there are no instruments appropriate to measure the attainment of an objective, you will probably have to adapt or develop an instrument. Seek the assistance of an evaluation or testing specialist to help you adapt or develop an assessment instrument. Also, you might want to consider modifying the objective.

WHAT YOU ACCOMPLISHED IF YOU COMPLETED THIS SECTION

- Determined whether assessment instruments had been specified or selected for each of the program objectives, and if they had been specified/selected, whether you were able to determine the basic appropriateness of the instruments
- If they had not been specified, you were able to identify the behaviors to be assessed and select appropriate assessment instruments
- Identified sources of assistance in the selection of or development of assessment instruments

FORM FOR RECORDING ASSESSMENT INSTRUMENT PLAN

Abbreviated Objective	Learning Behavior to Be Assessed	Assessment Instruments
1		
2		
3		
4		
5		

7. DEVELOP DATA COLLECTION PROCEDURES

Definition: DATA COLLECTION—The act of obtaining data from or about program participants by means of a specified procedure or set of procedures

EXAMPLE

Assessment Instrument	Data Collection Procedures	Date
XYZ Achievement Test	1. Training staff and faculty in test administration and scoring procedures	Sept. 25
	2. Select random sample of students to be assessed	Sept. 10
	3. Administer the test according to the standardized instructions in the test manual	Oct. 5-16
	4 Monitor testing and assemble completed instruments	Oct. 5-16

WHAT ARE YOU EXPECTED TO DEVELOP FOR THIS SECTION?

- A list of data collection procedures for each assessment instrument

INSTRUCTIONS

1. Refer to the previous section on Identifying Assessment Instruments, page 35. List the instruments you have selected on the form on page 42 under the appropriate category (i.e., achievement tests, observation instruments, questionnaires, checklists/logs).

   Check to see if there is a test administration manual for each instrument.

   If there is a manual available for any of the instruments, determine whether standard instructions are available for administering the instruments and scoring the results. Check the appropriate columns for each instrument.

2. If there are standard instructions for administering and scoring the assessment instruments you will be using, label each test administration manual with the number of the program objective to be assessed (i.e, program objective 1). Have the manuals available for future reference.

3. Determine when the assessment instruments will be used to collect data and who will be responsible for collecting the data (who will be administering the instruments). Record this information on the form on page 43.

   After completing the form, proceed to the next section on page 45.

4. If there is no manual of instructions for administering a selected or developed instrument, or if the instructions are incomplete, you will have to develop a set of instructions. Use the guide below to assist you in developing a set of procedures.

   - A precise set of directions for administering the instrument
   - A precise set of directions for scoring the instrument
   - Specification of the population for which the instrument is intended
   - Specification of time required to administer the instrument
   - Specification of the conditions required for the administration of the instrument such as room environment, grouping, etc.

   After you have drafted a set of data collection procedures, have someone in your program review them to see if the procedures are clear and concise. Make revisions if required.

   Record data collection procedures, dates, and personnel on page 43.

   After completing the form, proceed to the next section on page 45.

WHAT YOU ACCOMPLISHED IF YOU COMPLETED THIS SECTION

- Determined if standard instructions are available for selected assessment instruments
- Developed a set of instructions if they were not already available
- Recorded data collection procedures, dates, and personnel

FORM FOR LISTING ASSESSMENT INSTRUMENTS

List the assessment instruments you selected to evaluate your programs and place a check in the appropriate column.

Assessment Instruments	Standard Instructions Are Available for:	
	Administration	Scoring
Achievement Tests—Norm-Referenced 1. 2. 3. 4.		
Achievement Tests—Criterion-Referenced 1. 2. 3. 4.		
Observation Instruments 1. 2. 3. 4.		
Questionnaire 1. 2. 3. 4.		
Checklists/Logs 1. 2. 3. 4.		

FORM FOR RECORDING DATA COLLECTION PLAN

Assessment Instrument and Objective	Data Collection Procedures	Dates	Per for

8. SELECT DATA ANALYSIS TECHNIQUES

Definition: DATA ANALYSIS TECHNIQUE—A procedure applied to a set of data for purposes of summarization or display.

EXAMPLES

BASIC DESCRIPTIVE STATISTICS

- Arithmetic mean—computing the average score
- Median—computing the midpoint in a range of scores
- Standard deviations—computing the variability within a group of scores

MORE COMPLETE INFERENTIAL STATISTICS

- t-test—comparison between two means to tell whether they differ significantly
- Analysis of variance—comparison of several arithmetic means to determine whether the means differ significantly

WHAT ARE YOU EXPECTED TO DEVELOP FOR THIS SECTION?

- A recorded data analysis technique for each program objective

INSTRUCTIONS

1. Reread evaluation section of your program document (if you have one). Determine whether data analysis techniques have been specified.

2. If data analysis techniques have been specified, determine whether they are appropriate for each program objective and accompanying evaluation design you selected on page 27 in this workbook. Refer to pages 48 and 49 in this workbook to determine the appropriateness of your techniques.

3. If the specified data analysis techniques are appropriate for each program objective, turn to page 47 in this workbook and record them.

4. If data analysis techniques are not specified or are inadequate, you will have to select appropriate ones. Refer to the chart on pages 48 and 49 in this workbook for information that will help you in making an appropriate selection.

5. Record the data analysis techniques you have selected on the form on page 47.

6. Proceed to the next section of page 51.

WHAT YOU ACCOMPLISHED IF YOU COMPLETED THIS SECTION

- Identified whether data analysis techniques had been specified

- If they had not been specified, you were able to select appropriate analysis techniques based on the program objectives and evaluation design.

FORM FOR RECORDING DATA ANALYSIS PLAN

List all the data analysis techniques selected to measure each program objective. There may be more than one technique for each objective if you are using more than one assessment instrument.

Abbreviated Objective	Assessment Instrument	Selected Data Analysis Technique
1		
2		
3		
4		
5		

ADDITIONAL INFORMATION

RECOMMENDED DATA ANALYSIS TECHNIQUES FOR SELECTED EVALUATION DESIGNS AND OBJECTIVES

Evaluation Designs	Example of Objectives Specifying an Evaluation Design	Recommended Data Analysis Techniques
Evaluation Designs Using the Special Program (Experimental) Group as a Standard		
1. **One Group Pretest-Posttest**	Remedial reading students with **80 percent or better attendance** will show a **mean gain** of 4 months in reading comprehension for every 4 months of instruction. Gain will be measured by the CTBS, Level 3 reading comprehension section.	Derive the arithmetic mean—a descriptive statistic (see statistics book or a consultant for the computational formula)
	The **median percentile rank** for those students at Y School enrolled in the K, 1st, 2nd, 3rd grade reading programs **will be 5 points higher for each grade** on a May 1975 **posttest than on the October 1974 pretest** for the same students.	Derive the median—a descriptive statistic (see statistics book or a consultant for the computational formula)
Evaluation Designs Using a Criterion for a Standard		
2. **Individual Student Criterion Mastery Design**	Every student will correctly respond to 75 percent of the items on the Reading Mastery Test given at the completion of Reading Unit A.	Calculate a percentage—a descriptive statistic (see statistics book or a consultant for the computational formula)

Evaluation Designs	Example of Objectives Specifying an Evaluation Design	Recommended Data Analysis Techniques
3. **Group Criterion Mastery Design**	Prior to February 1975, **80 percent or more** of the full-time trainees enrolled in Graphic Arts in September 1974 will **complete 12 or more** of the instructional components.	Calculate a percentage—a descriptive statistic (see statistics book or a consultant for the computational formula)
Evaluation Designs Using Comparison Groups as a Standard		
4. **Pretest-Posttest Design with Comparison Group** (random assignment of students to both groups)	Upon completion of the second year of the experimental math program, students participating in the program will show a statistically significant gain (.05) level from pretest to posttest on the Iowa Mathematics Series over those students assigned to the regular math program.	Derive the "t" test on mean posttest scores—an inferential statistic (see statistics book or a consultant for the computational formula)
5. **Posttest Only Design with Comparison Group** (random assignment of students to both groups)	Students completing 3 years of the Follow-Through Program will score significantly higher (.05) level on the Illinois Test of Psycholinguistic Abilities than students who received the regular school program for 3 years.	Derive the "t" test on mean posttest scores—an inferential statistic (see statistics book or a consultant for the computational formula)
6. **Pretest-Posttest Design with Nonequivalent Comparison Group** (students have not been randomly assigned to groups)	After 8 months of instruction, 10th grade students enrolled in the Work Experience Program will show a statistically significant gain (.05) level on the Florida Social Studies Inventory as compared to the scores made by the control group.	Derive the "t" test on change scores—an inferential statistic (see statistics book or a consultant for the computational formula)

9. PLAN FOR THE PROCESSING OF DATA

Definition: PROCESSING OF DATA—The systematic treatment of collected data according to specified procedures

EXAMPLE

XYZ Achievement Test

- Scoring on the primary form to be done by hand
- Grade equivalencies and percentiles for the primary form to be computed by hand
- Scoring on elementary form to be done by computer center
- Grade equivalencies and percentiles for the elementary form to be done by computer
- All statistics to be run on the computer

WHAT ARE YOU EXPECTED TO DEVELOP FOR THIS SECTION?

- A recorded plan for the processing of data

INSTRUCTIONS

1. Check the evaluation section of your program document (if you have one) to determine whether a plan has been developed which specifies: (1) how the data from the assessment tools will be processed (including scoring, tabulation, conversion of raw numbers), (2) how the data analysis techniques will be applied, and (3) who will be responsible for processing the data.

2. If a plan has been developed, record it on the form on page 53.

3. If there is no plan for the processing of the data to be gathered by the assessment instruments, you will have to develop one.

   Turn to the recording from on page 53. List your assessment instruments (use abbreviations where necessary).

   Determine what steps will have to be performed in order to process the data your instruments have provided (see the example on page 51). This will include the scoring and tabulation of information responses and how computations are to be performed. Record this information on the form (page 53).

   Now determine who will perform the above steps. Will it be classroom teachers? The evaluator? Clerical staff? A test publisher scoring service? Record the information on the recording form (page 53).

4. Proceed to the next section on page 55.

WHAT YOU ACCOMPLISHED IF YOU COMPLETED THIS SECTION

- Identified whether a plan for processing data had been developed
- If no plan had been developed, you were able to develop a plan for processing data gathered from assessment instruments and for computing using specified data analysis techniques.

FORM FOR RECORDING DATA PROCESSING PLAN

Abbreviated Objective	Assessment Instrument (Abbreviate)	Steps Required to Process Data (see example on page 51)	Persons Responsible for Processing Data
Objective 1			
Objective 2			
Objective 3			
Objective 4			
Objective 5			

10. DEVELOP PROGRAM-MONITORING PROCEDURES

Definition: PROGRAM MONITORING—Procedures for determining the degree to which planned activities are in fact implemented

In the previous sections, you have been focusing upon the program objectives and on determining appropriate design and procedures. Now you will focus upon the program activities which have been designed to accomplish the program objectives and determine how you will plan to monitor those activities.

EXAMPLE

Activity	Monitoring Procedures	Dates
Implementation of the Wilcox Reading Program	Monthly classroom visitation using Monitoring Form 2 as a recording device	Monthly Oct-May

WHAT ARE YOU EXPECTED TO DEVELOP FOR THIS SECTION?

- A recorded plan for the monitoring of your program activities
- Forms to use when monitoring those activities

INSTRUCTIONS

1. Reread the section of your program document which specifies what activities will be conducted for each program objective and determine whether a plan has been developed for monitoring those activities during the year.

2. If a monitoring plan has been developed, record it on the form on page 57. If there are many columns left blank, determine the information required and fill in the missing data.

3. If a monitoring plan has not been developed, determine what activities you will want to monitor during the operation of the program and list them on the recording form on page 57 in this workbook.

4. Determine what types of monitoring forms you will be using to collect information. There are samples of monitoring forms starting on page 59 in this workbook. You may want to adopt or adapt some of them or develop your own forms.

   Indicate the forms you will be using by filling out the second column on the recording form on page 57.

5. Determine when monitoring will take place and record the information on page 57.

6. Finally, you will want to determine who will be doing the monitoring. Indicate those persons in the last column on the recording form on page 57.

7. After completing this section proceed to the next section on page 65.

WHAT YOU ACCOMPLISHED IF YOU COMPLETED THIS SECTION

- Determined whether a monitoring plan existed for your program
- If it did not exist, you were able to develop a plan
- Selected monitoring forms to use in implementing the monitoring plan

FORM FOR RECORDING MONITORING PLAN

Activities to be Monitored	Observation Instrument to be Used	Monitoring Dates	Person(s) Responsible for Monitoring

SAMPLE MONITORING FORMS

SAMPLE MONITORING FORM 1

Program Activities	Is Activity Taking Place as Planned?			Evidence Available				
	Yes	No	Not Known	Observation	Records	Conference	Other	None
1. _____ (List Activities to Be Monitored)	☐	☐	☐	☐	☐	☐	☐	☐
2. _____	☐	☐	☐	☐	☐	☐	☐	☐
3. _____	☐	☐	☐	☐	☐	☐	☐	☐
4. _____	☐	☐	☐	☐	☐	☐	☐	☐
5. _____	☐	☐	☐	☐	☐	☐	☐	☐
6. _____	☐	☐	☐	☐	☐	☐	☐	☐
7. _____	☐	☐	☐	☐	☐	☐	☐	☐
8. _____	☐	☐	☐	☐	☐	☐	☐	☐
9. _____	☐	☐	☐	☐	☐	☐	☐	☐
10. _____	☐	☐	☐	☐	☐	☐	☐	☐
11. _____	☐	☐	☐	☐	☐	☐	☐	☐

EXAMPLE OF HOW TO USE FORM 1

Program Activities	Is Activity Taking Place as Planned?			Evidence Available				
	Yes	No	Not Known	Observation	Records	Conference	Other	None
1. Reading instruction in Spanish will be given to each child each day for 20 minutes.	☐	☐	☐	☐	☐	☐	☐	☐
2. Each classroom will be responsible for developing 5 language centers.	☐	☐	☐	☐	☐	☐	☐	☐
3. Parents will be encouraged to make one classroom visit per month to observe their child's instructional program.	☐	☐	☐	☐	☐	☐	☐	☐

Note: The above activities are not all instructional. Activities 2 and 3 are program-support activities.

SAMPLE MONITORING FORM 2

Instructional Activities	Time Allotted per Activity	Activity Conducted according to Program Specifications	
		Yes	No
1. _____	_____	☐	☐
2. _____	_____	☐	☐
3. _____	_____	☐	☐
4. _____	_____	☐	☐
5. _____	_____	☐	☐
6. _____	_____	☐	☐
7. _____	_____	☐	☐
8. _____	_____	☐	☐
9. _____	_____	☐	☐
10. _____	_____	☐	☐
11. _____	_____	☐	☐
12. _____	_____	☐	☐

EXAMPLE OF HOW TO USE FORM 2

Instructional Activities	Time Allotted per Activity	Activity Conducted according to Program Specifications	
		Yes	No
1. Reading instruction in Spanish will be given to each child each day for a period of 20 min.	20 Min/Day	☐	☐
2. Teachers will instruct their class in the folklore of Mexico.	45 Min/Week	☐	☐
3. Instruction in math will be given to each child in his/her dominant language.	15 Min/Day	☐	☐

Note: All of the above activities are instructional. It would not be appropriate to include program-support activities in this element.

11. DEVELOP REPORTING PLAN

Definition: REPORTING—The supplying of evaluation information to decision makers and community members

TYPES OF REPORTING

Interim Reporting—Reporting that takes place during the program. Student progress and/or status of the implementation of program activities is reported.

End-of-the-Year Reporting—Reporting that takes place at the end of the program. Results of the program are compared to program objectives.

EXPECTED PRODUCT

- A recorded plan for reporting evaluation information

INSTRUCTIONS

1. In this workbook, on pages 23 and 24, you have recorded a list of data requirements to be used in the decision-making process. Determine which requirements will necessitate a report, either oral or written.

   List the data to be reported on the Form for Recording Your Reporting Plan on page 67. Remember to look for duplications in the data required. You will list the requirement only once on the Reporting Plan form.

2. Add the dates to the Reporting Plan form as to when the data is to be required.

3. List on the Reporting Plan form all those persons requiring the information.

   - Board members
   - Superintendent
   - Administrators
   - Instructional staff
   - Parent/community advisory committee members
   - Students
   - Community agents, newspaper editors, etc.

4. Determine how you will be reporting the evaluation information. Check one or both of the columns under "Mode of Reporting."

5. After you have completed the Reporting Plan form verify the data required and the dates with each of the persons designated to receive the information.

6. Remember to obtain district clearance on all reports before they are disseminated.

7. Turn to the next section on page 69.

WHAT YOU ACCOMPLISHED IF YOU COMPLETED THIS SECTION

- Developed a plan for reporting evaluation information.

FORM FOR RECORDING YOUR REPORTING PLAN

Evaluation Data to Be Reported	Who Is Responsible for Report?	Mode of Reporting		Report Format Developed?		When Is Report Due?	Who Will Receive the Report?	What Will the Report Data Col. Be Used for?
		Written	Oral	Yes	No			

12. DEVELOP TIMELINE TO MANAGE THE EVALUATION ACTIVITIES

Definition: TIMELINE—A management tool which graphically shows the functions/tasks to be performed, their time sequence, and the amount of time estimated for completion of each function or task

EXAMPLE

Management Functions	Months 1	2	3	4	5	Program Evaluator	Program Director	Instructional Staff	Others
Select evaluation staff	▲	▲				X	X		
Order materials	▲	▲				X	X		

WHAT ARE YOU EXPECTED TO DEVELOP FOR THIS SECTION?

- A management timeline

INSTRUCTIONS

1. Now that you have almost finished with planning for the evaluation of your program, you will want to develop a timeline for managing the major evaluation activities. Check your program document (if you have one) to see whether a management timeline for conducting the evaluation has already been developed.

2. If a timeline has been developed, review it to determine whether it includes all of the activities that will be important to specify for managing the evaluation. Also, check to see whether the dates and personnel are correct according to your evaluation plan.

   If the timeline seems adequate after this review, pull it out of the program document and put it up on a wall where you can refer to it regularly.

3. If there is no management timeline available, you will want to develop one. Since each program evaluation will be somewhat unique, you will have to construct your own timeline. On page 72 is a sample of a timeline and how to fill it out. Use this as a guide for developing your own. On page 73 is a timeline form which you can use to record your management timeline.

   On page 74 of this workbook, you will find a list of common evaluation-management functions. Select those functions which apply to your evaluation and list them on the timeline form on page 73. You will want to add some of your own functions which are not listed here.

   After you have listed the functions in sequential order, indicate the span of time during which each activity will take place and note the completion date. For the former, use the following code:

   ▲ Function to occur on that date

   ▲–▲ Function will take place over a period of time (e.g., October 9 - October 15)

   List all the personnel involved in the evaluation activities in the spaces provided for personnel at the top of the timeline. For example:

Program Evaluator	Program Director	Instructional Staff	Others

Check the appropriate boxes after each management function which indicate the persons involved in that function:

Management Functions	Program Evaluator	Program Director	Instructional Staff	Others
Prepare interim reports	X			
Obtain staff services	X	X		

4. Review the timeline with the appropriate staff members to make sure you have included all of the major evaluation functions. Revise the timeline if changes are required.

   If the timeline seems adequate after this review, pull it out of the program document and put it up on a wall where you can refer to it regularly.

5. Proceed to the next section of this handbook on page 75.

WHAT YOU ACCOMPLISHED IF YOU COMPLETED THIS SECTION

- Determined whether an evaluation timeline existed for your program
- If there was no evaluation timeline, you developed one.

EVALUATION TIMELINE

Management Functions	Completion Date	Time When the Activity Will Occur — Months (July to July) 1	2	3	4	5	6	7	8	9	10	11	12	Program Evaluator	Program Director	Instr. Staff	Principals	Teacher Aides	Clerical Staff
Obtain evaluation staff/services	9/6	▲	←	▲										X	X				
Order commercial assessment tools	8/15		▲											X					
Adapt nonstandardized assessment tools	8/27	▲	←	▲										X					
Reproduce adapted tools	9/1			▲															X
Develop data collection procedures	9/8		▲	←	▲									X					
Train data collectors	9/10			▲										X					
Select student assessment sample	9/22			▲										X					
Complete data collection schedule	9/28			▲										X	X	X	X	X	
Administer pretest tools	10/14				▲									X		X		X	
Etc.																			

FORM FOR RECORDING EVALUATION TIMELINE

Management Functions	Completion Date	Time When the Activity Will Occur — Months 1	2	3	4	5	6	7	8	9	10	11	12	Program Evaluator	Program Director	Instructional Staff	Principals	Teacher Aides	Clerical Staff

ADDITIONAL INFORMATION

SOME EVALUATION-MANAGEMENT FUNCTIONS

Establish program goals
Establish program objectives
Determine needs
Obtain staff services
Order commercial assessment instruments
Adapt nonstandardized assessment instruments
Develop data collection procedures for local instruments
Select student assessment samples
Conduct inservice training
Complete data collection schedule
Reproduce adapted instruments
Train data collectors
Administer pretest instruments
Score/tabulate data
Analyze data
Monitor program activities
Prepare interim reports
Submit interim reports
Administer posttest instruments
Develop evaluation plan for next year
Prepare summative report
Submit summative report

KEEP A RECORD HERE OF ADDITIONAL MANAGEMENT FUNCTIONS
MADE PART OF YOUR PROGRAM EVALUATION TASK

13. IDENTIFY RESOURCES REQUIRED FOR THE EVALUATION

Definition: RESOURCES—What you have or can get to do the job

TYPES OF RESOURCES

- Personnel
- Materials and Supplies
- Equipment
- Services
- Space
- Time
- Money

WHAT ARE YOU EXPECTED TO DEVELOP FOR THIS SECTION?

- A list of resources needed to conduct evaluation plans that are within your budgetary allotments

INSTRUCTIONS

1. Review your evaluation plan as developed in this workbook. List the evaluation resources and dollars required to implement your evaluation plan. Use the form on page 77 to record this information.

2. After listing required resources and dollars, add the figures in the columns and enter totals in the spaces marked "Total $ Required."

3. Refer to your evaluation budget (if you have one) and locate the amounts budgeted for each of the resource categories (personnel, materials, equipment, services).

   Insert the dollar figures you have available in the spaces marked "Total $ Available."

4. Now add the "Total $ Required" in the four columns. Write that figure in the space marked "Grand Total Required." Required."

   Add the "Total $ Available" in the four columns. Write that figure in the space marked "Grand Total Available."

   Subtract those grand total figures. Record the difference in the space marked "$ Difference."

If you are within your allotted budget, congratulations! You will not have to make any changes. Your final planning step will be to obtain approvals on your total plan.

If you are over your allotted budget amount, you will have to resolve the difference. One way to resolve the budget difference is to determine whether it is possible to get more money for your evaluation. If you do get more money and it is enough to cover the total cost of your required resources, you may now proceed to page 79.

If you cannot get any more money for your evaluation, you must now begin to modify your evaluation plans.

Consult with your program staff and other appropriate personnel to help you make revisions and budgetary cuts.

WHAT YOU ACCOMPLISHED IF YOU COMPLETED THIS SECTION

- Analyzed and listed the resources required to conduct an evaluation

FORM FOR RECORDING RESOURCE PLANNING

Evaluation Personnel	$	Materials	$	Equipment	$	Services	$
Total $ Required		Total $ Required		Total $ Required		Total $ Required	
Total $ Available		Total $ Available		Total $ Available		Total $ Available	

Grand Total Required _____

Grand Total Available _____

$ Difference _____

14. SUMMARY AND WALL CHART

You have now developed an evaluation plan. If you completed this workbook you were helped to:

- Define the purpose of the evaluation
- Review program needs assessment information
- Review program goals and objectives
- Identify data requirements
- Determine evaluation design
- Identify assessment instruments
- Develop data collection procedures
- Select data analysis techniques
- Plan for the processing of data
- Develop program monitoring procedures
- Develop a reporting plan
- Develop a timeline
- Identify required resources

The wall chart accompanying this workbook will serve as a basic management tool during the implementation of the evaluation plan. The next pages provide instructions in how to fill it out.

Final note:

If you have done a thorough job of completing each section of this *Workbook*, it, too, will prove to be a valuable management tool. Frequent reference to the plans you recorded in the early stages, as those plans materialize, will help keep the program evaluation on track. In a very real sense, the *Workbook on Program Evaluation*, once completed, is the program evaluator's tool for monitoring his or her own performance as a program evaluator. It will prove valuable also as you start afresh to pursue the next cycle to enhance the quality of education through continuing program improvement.

INSTRUCTIONS FOR FILLING OUT THE WALL CHART

You have already completed planning and recording the evaluation for your program. Key information which will assist you in implementing your plan is now to be transferred from this workbook to your wall chart.

The wall chart contains 11 columns. The information to be written in those columns can be found in this workbook on the pages indicated below:

- Statements of Need ..... Pages 12, 13
- Program Objectives ..... Pages 18, 19, 20
- Evaluation Design ..... Page 27
- Assessment Tools ..... Page 38
- Assessment Dates & Personnel ..... Page 43
- Data Analysis Techniques ..... Page 47
- Program Activities to be Monitored ..... Page 57
- Monitoring Dates & Personnel ..... Page 57
- Key Reporting Dates ..... Page 67
- Persons/Agency to Receive Reports ..... Page 67
- Use to be Made of the Data/Report ..... Page 67

Page 81 provides you with a sample wall chart with partial entries. Use it as a guide for making and filling out a wall chart of your own.

SAMPLE OF A PARTIALLY COMPLETED WALL CHART

STATEMENTS OF NEED	PROGRAM OBJECTIVES	EVALUATION DESIGN	ASSESSMENT INSTRUMENT	ASSESSMENT DATES AND PERSONNEL	DATA ANALYSIS TECHNIQUES	PROGRAM ACTIVITIES TO BE MONITORED	MONITORING DATES AND PERSONNEL	KEY REPORTING DATES	PERSONS/ AGENCIES TO RECEIVE REPORTS	USE TO BE MADE OF THE DATA/REPORTS
Need: To increase reading comprehension skills of 3rd & 4th grade students so that they will be at grade level by the end of the 4th instructional year.	75% of the 3rd grade students participating in the ABC Reading Program will score at grade level or above on the CTBS Reading Comprehension subtest given after 8 months of specialized instruction	Group Criterion Mastery Design	Comprehensive Test of Basic Skills Teacher-made interim criterion-referenced test	May Evaluator & Assistant September January Classroom teachers	Compute grade equivalency scores & determine % meeting the criteria. Tally of raw scores	• Individualized reading program activities • Usage of learning centers • Percent of time allotted to reading instruction	Every month Sept. thru May Program Evaluator & Evaluation Assistant	October Prereport February Interim Report June Posttest Information	Program Director Advisory Committee Program Director District Supt., Program Director, Board of Educ. Advisory Committee	Baseline information to develop instructional plans. Progress of students Determine whether to modify program. Program Modification
	100% of the 4th grade students participating in the ABC Reading program for at least 2 years will score at grade level on the CTBS Reading Comprehension subtest.	Group Criterion Mastery Design	Comprehensive Test of Basic Skills Teacher-made interim criterion-referenced test	September May January	Compute grade equivalency scores & determine % meeting the criteria.	• Individualized reading program activities • Usage of learning centers • Percent of time allotted to reading instruction	Every month Sept. thru May Program Evaluator & Evaluation Assistant	October Prereport February Interim Report June Posttest Information	Program Director Advisory Committee Program Director District Supt., Program Director, Board of Ed. Advisory Committee	Baseline information to develop instructional plans. Progress of students Program Modification Determine whether to continue program

INFORMATION ABOUT EIP MATERIALS AND WORKSHOPS

Information about ordering Evaluation Improvement Program materials, about Evaluation Improvement Program workshops that use these materials, or about making arrangements for specially scheduled EIP workshops for local, regional, or state inservice training programs may be obtained by writing or telephoning the Evaluation Improvement Program at Educational Testing Service, Room P-069, Princeton, NJ 08540, (609) 921-9000 or at any of its regional offices listed below.

REGIONAL OFFICES OF EDUCATIONAL TESTING SERVICE

3445 Peachtree Road, NE
Suite 1040
Atlanta, Georgia 30326
(404) 262-7634

3724 Jefferson, Suite 100
Austin, Texas 78731
(512) 452-8817

1947 Center Street
Berkeley, California 94704
(415) 849-0950

2200 Merton Avenue
Room 216
Los Angeles, California 90041
(213) 254-5236

960 Grove Street
Evanston, Illinois 60201
(312) 869-7700

GPO Box 1271
San Juan, Puerto Rico 00936
(809) 763-3636, 3640, or 3760

One Dupont Circle
Suite 310
Washington, D.C. 20036
(202) 296-5930

2 Sun Life Executive Park
100 Worcester Road
Wellesley Hills, Massachusetts 02181
(617) 235-8861 or 8860